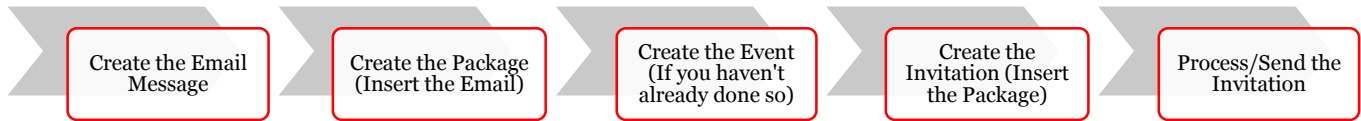
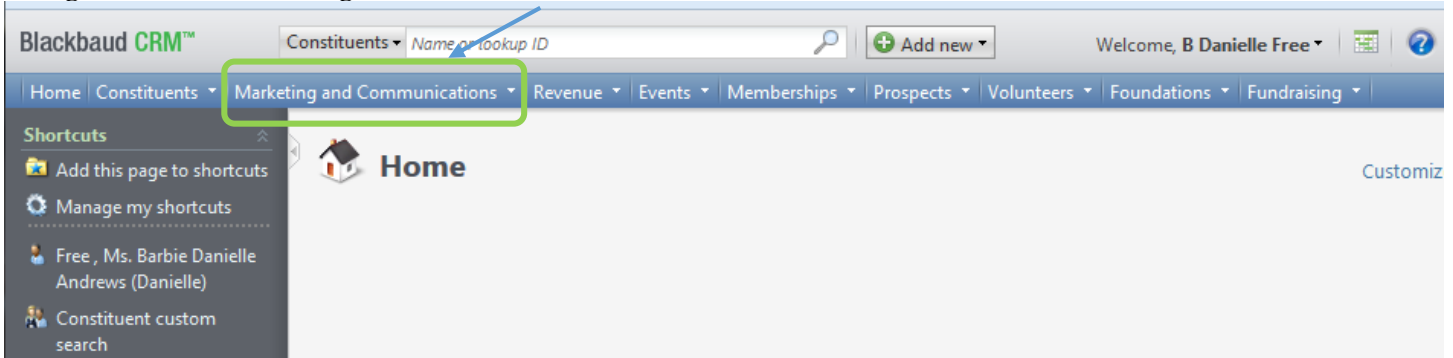


5 Steps to Processing Event Invitations via Email

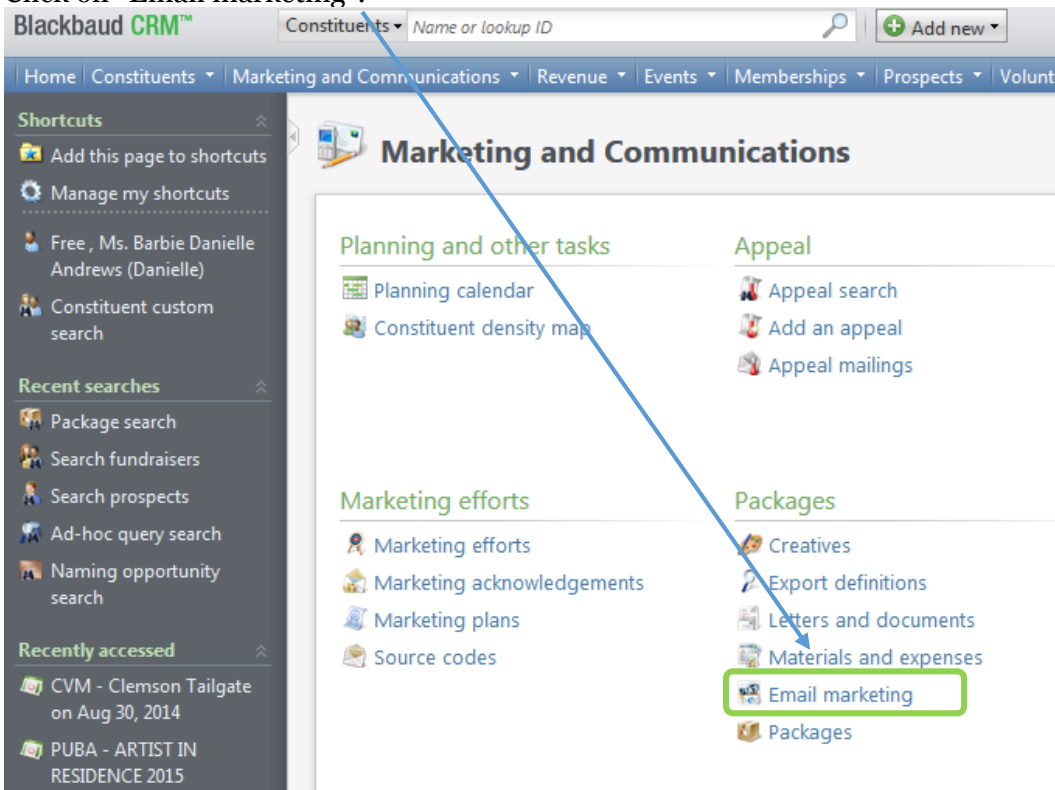


Step 1: Create the Email Message

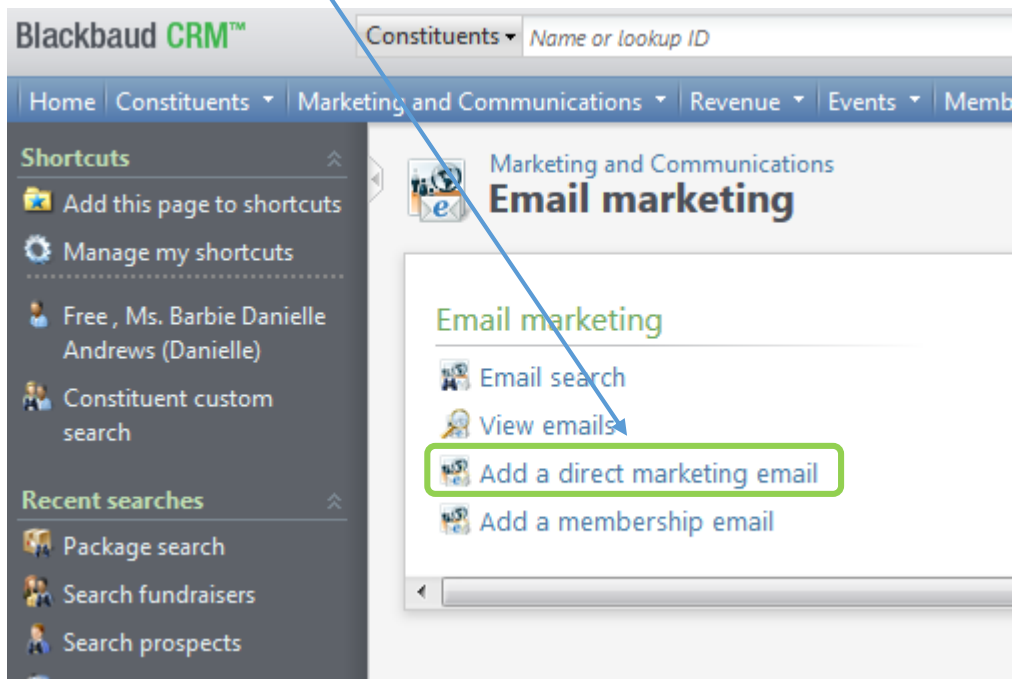
Navigate to the “Marketing and Communications” functional area.



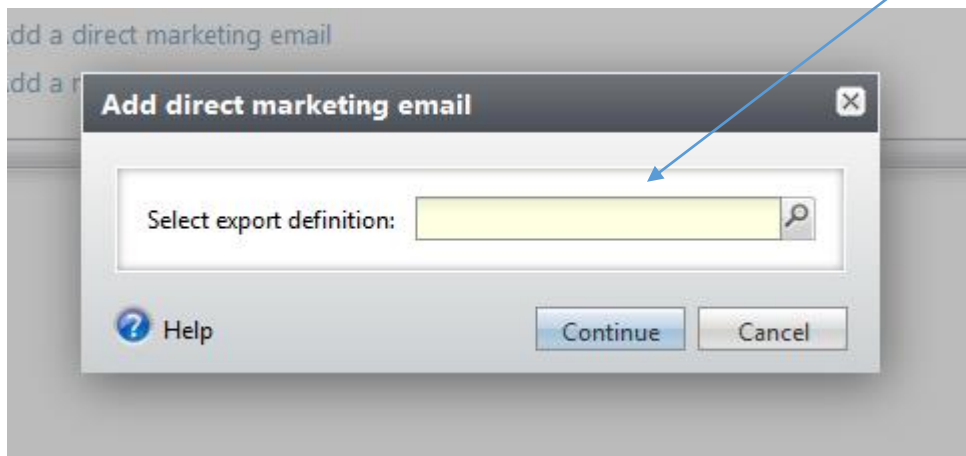
Click on “Email marketing”.



“Add a direct marketing email”.



Search for and select the desired export definition. **This is used to populate merge fields within the email and will determine what fields display in the downloaded output.** Click continue.



This will eventually be the body of the email.

Name: Name of the email (internal purposes) **use your naming convention.

Description: Enter a brief description (internal purposes)

Subject: Subject line seen by constituents when they receive the email

From address: Email address the email shows as being sent from

From name: Name the email shows as being sent from

Reply address: Email address that replies should be delivered to

Failure notification: Email address that failures will be forwarded to **enter records@uga.edu**

At this point you'll insert your HTML code – this is what will generate the look and feel of your email (what the constituents will see). GAIL is not designed to build emails. You'll want to build your template in MailChimp or have someone build the email for you. To insert your email code you will click on the “HTML” icon then copy and paste in the code. **For more information on this please work with your IT or communications team or contact our web group at askit@uga.edu.**

You will also need to add links to communication preference and privacy policy pages at this point. To do this you will click on the “chain link” icon – the screen you see below will appear.

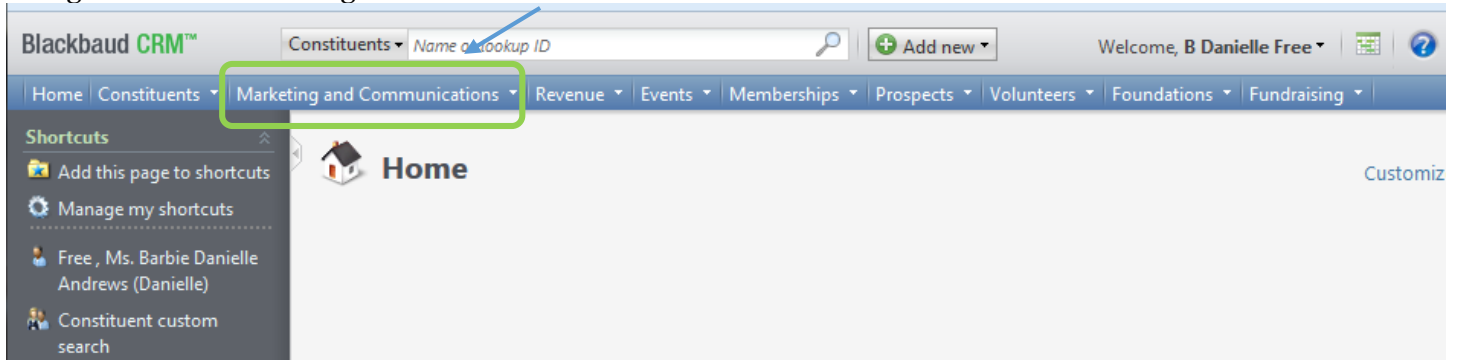
Select “Special page”. Choose “Email Preferences Page” and select the page that corresponds to your site. **Contact askit@uga.edu if there is not a page that meets your needs.** Click ok.

Repeat the same steps. Select “Special page” and choose “Privacy Page”. Select the generic “Privacy Policy (Alumni, Dornors & Friends) option. Click ok.

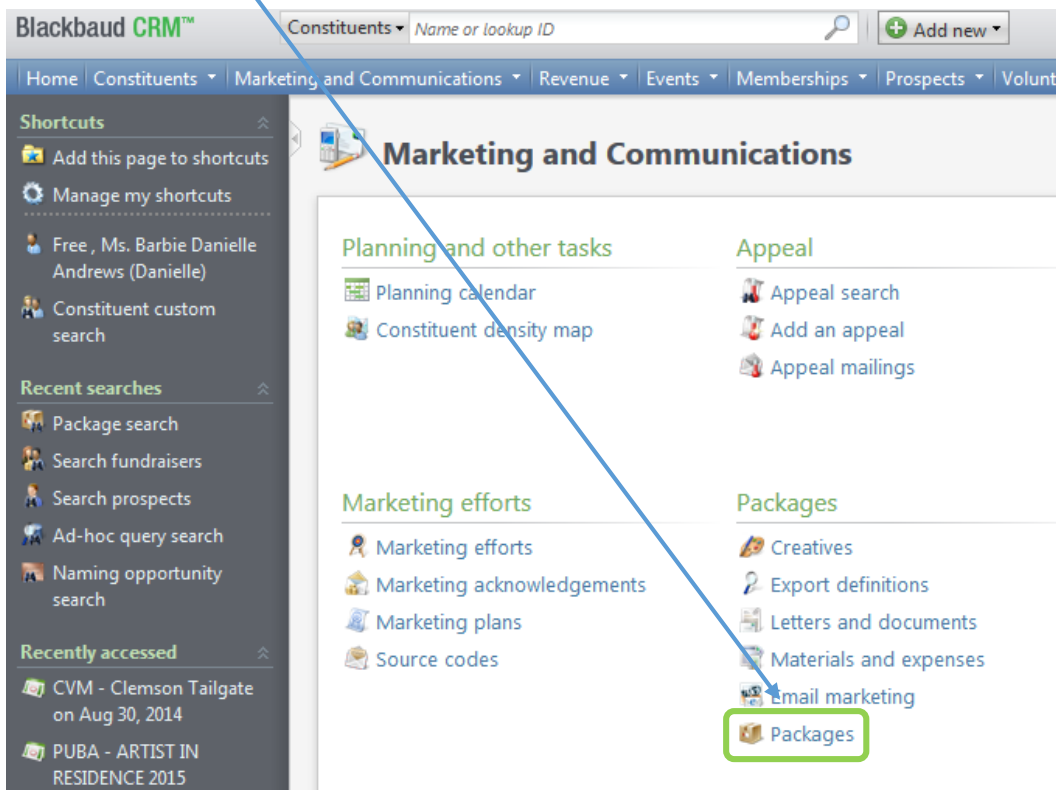
Save the email message.

Step 2: Create the Package

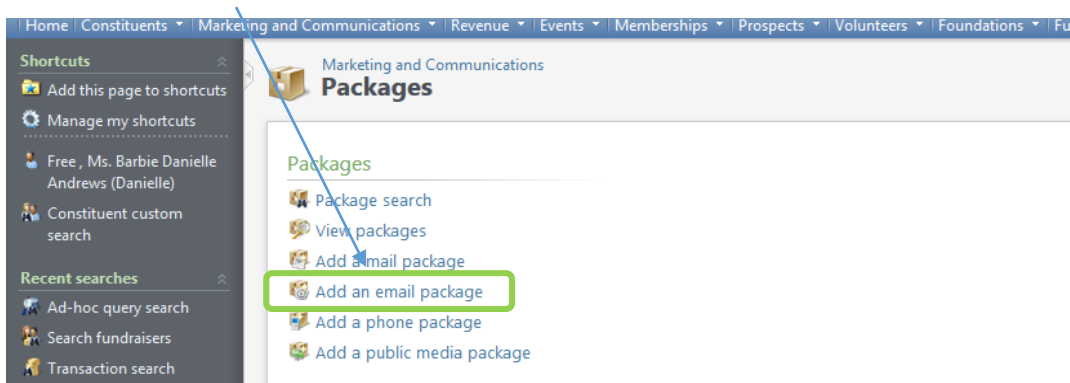
Navigate to the “Marketing and Communications” functional area.



Click on “Packages”.



Click “Add an email package” and the screen below will appear.



The screen below will appear.

Add email package

Package details

Name: ASRV – Homecoming Tailgate Package – Fall 2014

Description: Package for the Homecoming Tailgate Fall 2014.

Site: Development and Alumni Relations

Category: Social

Package code: Package

Channel code: Email

Costs

Base cost: \$0.0000 Distribution: Per piece

Additional content cost: \$0.0000

Total per piece cost: \$0.0000

Primary content

Message: ASRV – Homecoming Tailgate – Fall 2014

Export definition: Event Basic Export

Help Save Cancel

Package details

Name: Name the package using your naming convention. (You can use the same name that you used for your message)

Description: Select a brief description of the package itself

Site: Enter your site

Category: Select a category

Package code: Select “Package”

Channel code: Select “Email”

Costs

Not required but if you’d like to track costs you can do that here.

Primary content

Message: Search for and select you previously created email message.

Export definition: This will automatically populate based on the email message you enter in the field above.

Save the package.

Step 3: Create the Event

Navigate to the “Events” functional area. If you haven’t already done so you’ll need to add a new event. If you have, you’ll search for and select the existing event. **If you need additional information on how to create events please sign up for an events class at <http://dar.uga.edu/gail>**

Step 4: Create the Invitation

From within the event click on the “Invitations” tab.

BDF - Danielle's Test Event

Event date: 7/24/2014 Status: ✔ Active 100% **Event expenses** 100% **Event capacity**
Site: Development and Alumni Relations Lookup ID: 8-10000709 Expense budget: \$0.00 Event capacity: 0
Location: Agreed expenses: \$0.00 Will attend: 1
Room/Unit: Amount paid: \$0.00 Will not attend: 0
Contact: 0% of budget 0% of capacity
Coordinator:
Category:

Tasks/Coordinators Registrations Registrants-More Details Speakers Expenses Options **Invitations** Designations Appeals Do

Coordinators (0) + Add [icon] More ▾

Coordinator	Event	Primary
-------------	-------	---------

Tasks (0) + Add + Copy from [icon] Filters [icon] More ▾

Tasks: <All> [dropdown] Include completed Apply Reset

Name	Owner	Date due	Event
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Click “Add” to create a new invitation.

Tasks/Coordinators Registrations Registrants-More Details Speakers Expenses Options **Invitations** Designations App

Invitations (1) + Add [icon] More ▾

Name	Mail date	Description
✔ BDF - Danielle's Test Invitation	7/24/2014	test invite for the communications class on 7.24.2014.

The screen below will appear. Enter the “General” details.

Add an invitation

General Processing Options

Name: [text input]
Description: [text area]
Mail date: [date picker]

Results

Create selection
Selection: [text input]
 Overwrite existing selection

Ignore this section.

General

Name: Give your invitation a name using your naming convention. **This will appear as the tag on any constituent’s record that receives the invitation**

Description: Describe the invitation.

Mail date: This is the date that you plan to send the invitation. **This can be a future date**

Click on the "Processing Options" tab.

Processing Options

Select "Send through email only"

Email Package: Search for and select the email package you created previously.

Address processing: Select "General User Preference"

Name format: Select "Preferred Name Format"

Include: Select "All qualifying constituents" **This will send each individual in the invitee list an email invitation.**

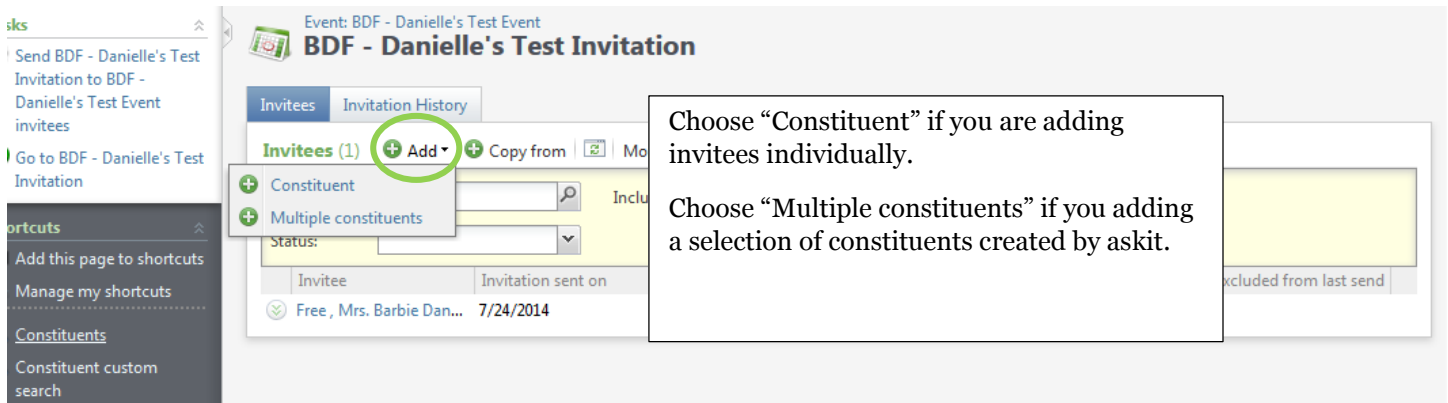
Save the invitation.

Step 5: Process and send the Invitation

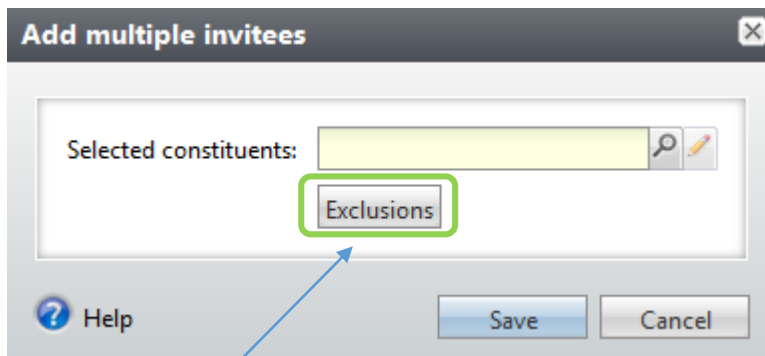
Select and click on the desired invitation name to add invitees.

Name	Mail date	Description
BDF - Danielle's Test Invitation	7/24/2014	test invite for the communications class on 7.24.2014.

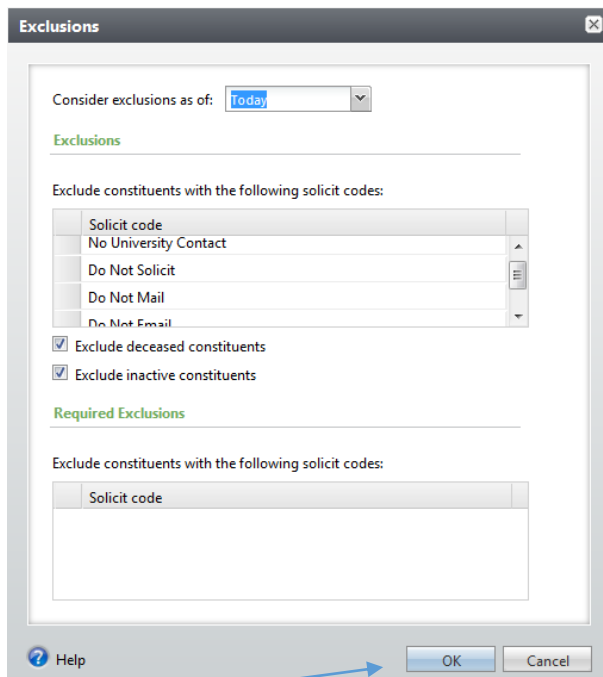
The screen below will appear. Click “Add” to select your desired constituents.



When you select to add “Multiple constituents” the box below will appear. Search for and select the selection that you had IT create for you.



You must also process your own exclusions when you choose to add multiple constituents. Click “Exclusions” and the screen below will appear.



Here, you will add/remove “solicit codes” that pertain to your mailing.

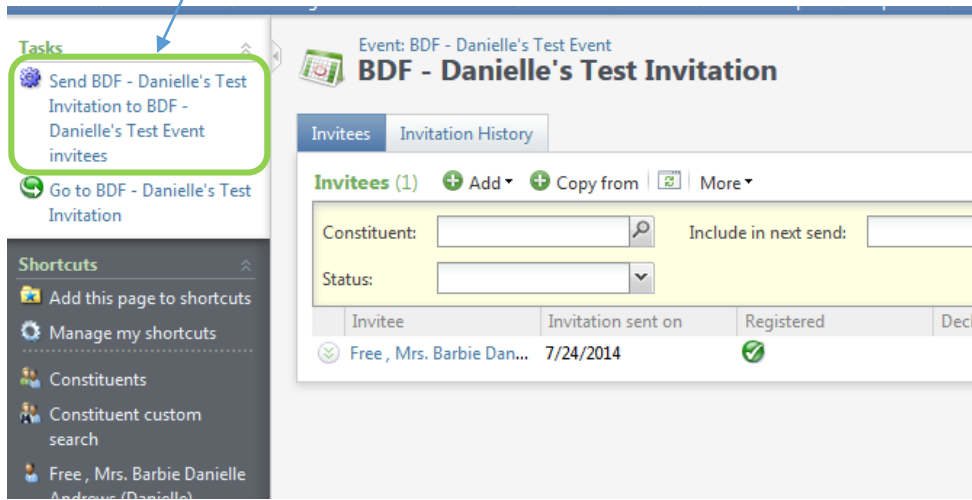
For example, if this were a College of Education email invitation the list of solicit codes would appear like this:

No University Contact
Do Not Email
Do Not Email – COE

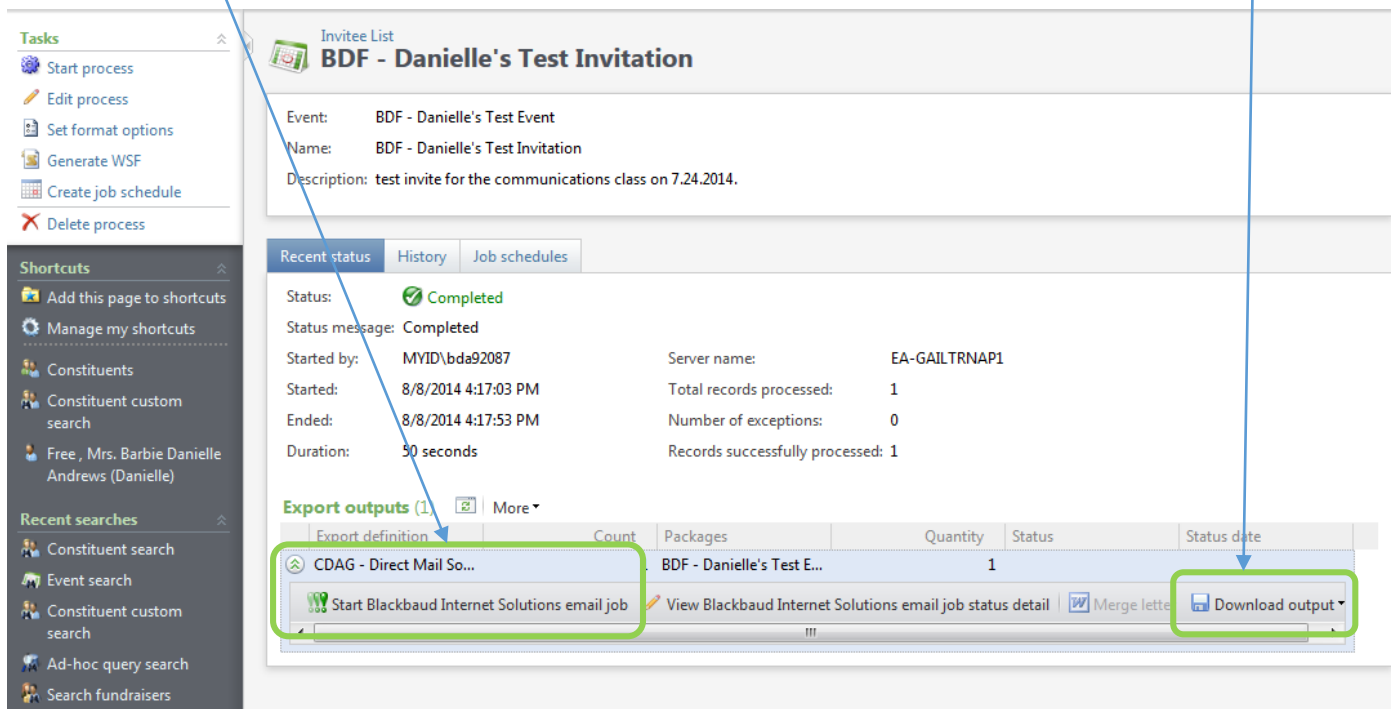
****You would remove the Do Not Solicit and Do Not Mail solicit codes being as they do not pertain to this specific mailing****

Click “ok” to save your exclusions.

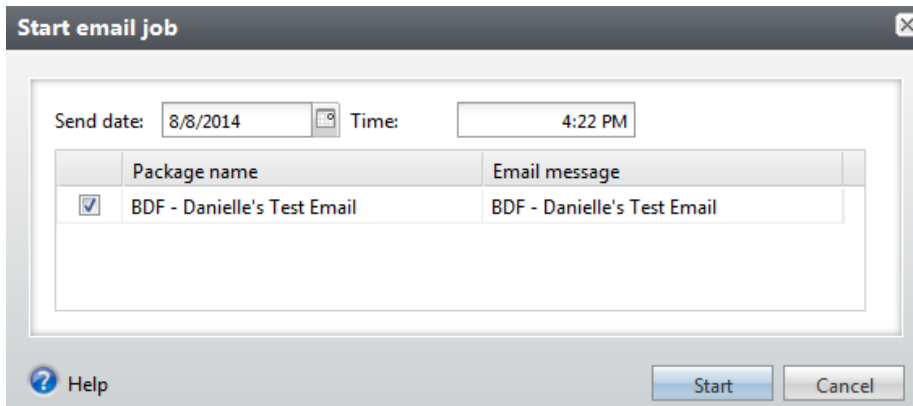
When you are satisfied that your list of invitees is complete and you are ready to send the invitation “Send” the invitation. Click “start” when the next dialogue box appears. This is not the actual sending of the email, it is the process that tags constituent records.



You will be redirected to a status screen. This screen is where you will select to actually SEND the invitation. Click the two green arrows beside the export definition name to expand more options. Click “Start Blackbaud Internet Solutions email job” to schedule the send. Click “Download output” to download an Excel file of the invitees.



When the dialog box below appears you will schedule when your email is to be entered into the Blackbaud email queue. *****IMPORTANT: Once you click start you cannot undo this process. Your email will be sent on the date you selected as the send date.*****



The dialog box is titled "Start email job" and contains the following elements:

- Send date: 8/8/2014
- Time: 4:22 PM
- A table with two columns: "Package name" and "Email message".
- A "Start" button and a "Cancel" button.
- A "Help" button with a question mark icon.

	Package name	Email message
<input checked="" type="checkbox"/>	BDF - Danielle's Test Email	BDF - Danielle's Test Email